# Job Aid
## Startup Settings & Tips

*If you need more details or explanation for any of the following tasks, please see the full Job Aid for that specific task.*

## GUS Cloud – General Info for All Modules

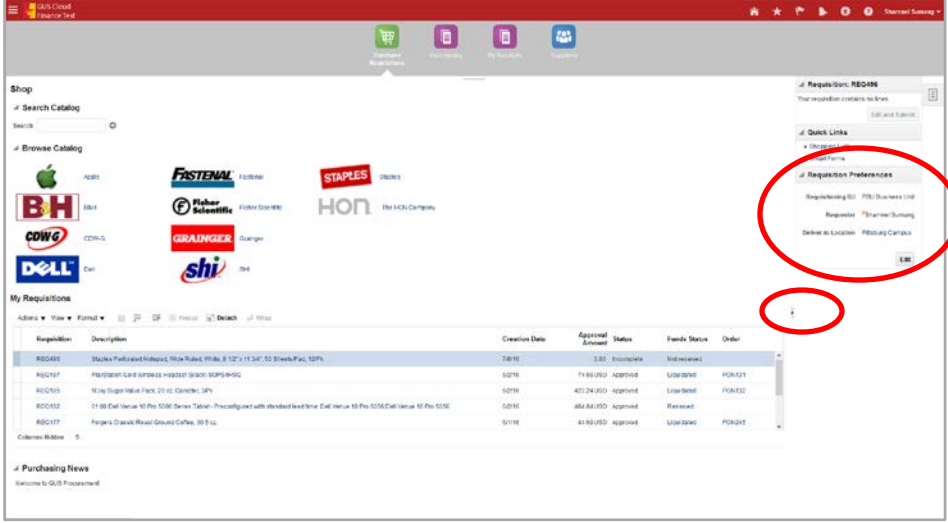| | Actions |
|---|---|
| Terms: | **PSU Business Unit** is our only "BU"<br>**Requester:** The person who initiates the transaction (typically you)<br>**Buyer:** Purchasing Office agents<br>**Assignee:** User that a task has been assigned to. This could be an approver, or someone that needs to provide information.<br>**Modules:** GUS Cloud is divided into modules, such as Expenses and Procurement<br>**Expenses:** PCard transactions, employee travel and other miscellaneous reimbursements<br>**Navigator:** Menu icon at top left of screen<br>**Notification Bell:** List of notifications that require your attention<br>**Worklist:** List of items that require your attention or action |
| Chart of Accounts: | **Cost Center** = Unit<br>**Account** = Object Code (now correspond to State of Kansas values)<br>**Dept Cost Center (Optional)** = Departmental value provided by you<br>**Dept Account (Optional)** = Departmental value provided by you (sometimes required for projects and grants)<br><br>Remember to use the Chart of Accounts Mapping App to convert your old GL string to the new GUS Cloud GL string! |
| Day 1 Tips: | ➢ Do you have the **Job Aids**?<br>➢ Make sure that you are logging into **Production** and not Test.<br>   ❖ Colors should be traditional PSU Colors<br>   ❖ GUS Cloud icon in My Gus should **not** say 'Training'<br>   ❖ You should **not** see a banner across the top that says you are in a test environment<br>➢ Double check the **Icons** on the springboard, are you missing anything?<br>**TIP:** Don't use the back (← ) arrow on your browser. Instead, use function buttons such as **Done**, **Cancel**, or **Back** |
| Search Tips: | ➢ Customize the columns you see in areas you visit often.  Where the View menu<br>➢ is available, click **View > Columns > Show All** to see all available columns.  Or, you can select individual columns.<br>➢ Recreate any saved searches that you may have created during testing.<br>➢ Click the 'Search' in a drop down search menu to access the full search.<br>➢ You may need to use a variety of options. Search by value or description.<br>➢ Some **Searches** are case sensitive. Be sure to try Capital and lower case to produce results.<br>➢ If you cannot find a value you are looking for, try doing an 'Advanced' search and change the search parameters to 'Contains' instead of 'Starts With' |

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## GUS Procurement – Requisition Preferences

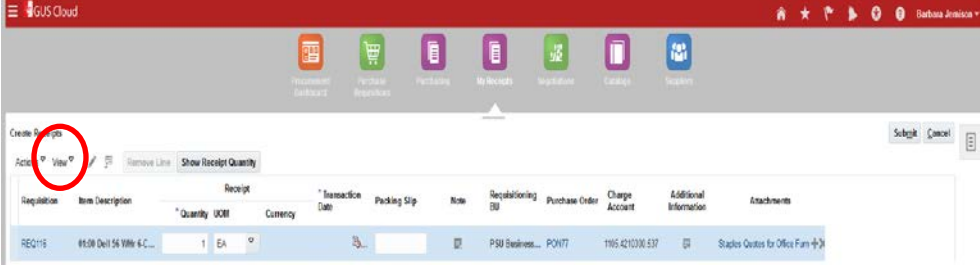Requisition Preferences, or favorite charge accounts (Full string) for all your Procurement purchases.

| Step | Action |
|------|--------|
| 1. | Begin by logging into Gus Cloud and navigating to the Purchase Requisitions page. Access the **Requisition Preferences** with the Edit button.  |
| 2. | Double check: **Your Name** is listed as Requester, and **PSU Business Unit** is listed as Requisitioning BU. Set your Deliver to Location to **Central Receiving** (300 E Lindburg) Add all your favorite charge accounts with **Nicknames** and full **Charge Account** strings, along with marking your **Primary** for default. |

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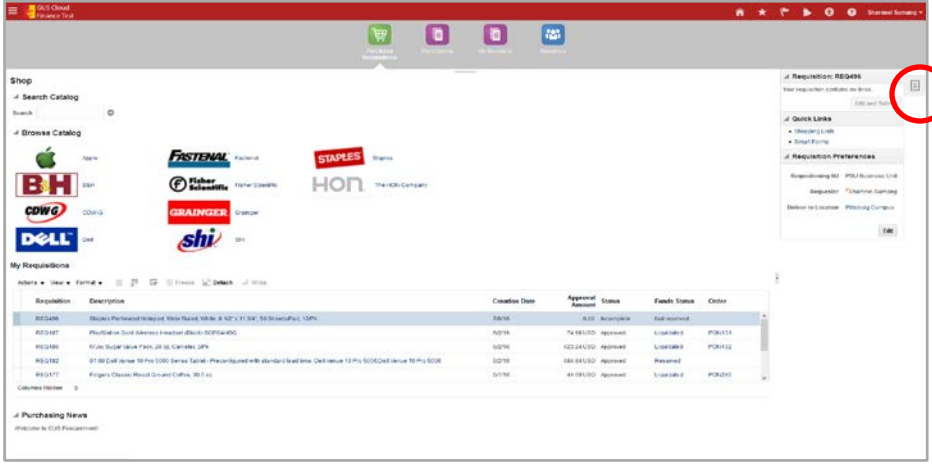## GUS Procurement – Receipts

| Step | Action |
|---|---|
| 1. | Begin by logging into Gus Cloud and navigating to the **My Receipts** page.<br><br><br><br>To enter a "show me everything" basic search: use **Items Due: Anytime. Save** and **Name** your search for later use. |
| 2. | Once you have items to receipt, be sure to **View> Columns> Show All** to add your notes and attachments to your receipts.<br><br> |

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## GUS Procurement – Manage Requisitions and Orders

| Step | Action |
|---|---|
| 1. | Begin by logging into Gus Cloud and navigating to the Purchase Requisitions page> Task Pane Icon to access your **Manage Requisitions**.  |
| 2. | Set your Requisitioning BU to **PSU Business Unit**.<br><br>Set Status to **ALL** to see all orders. **Save** and Name your search.<br><br>From your **View** dropdown, Columns> Show All to see all options. |

## GUS Financial – Expenses

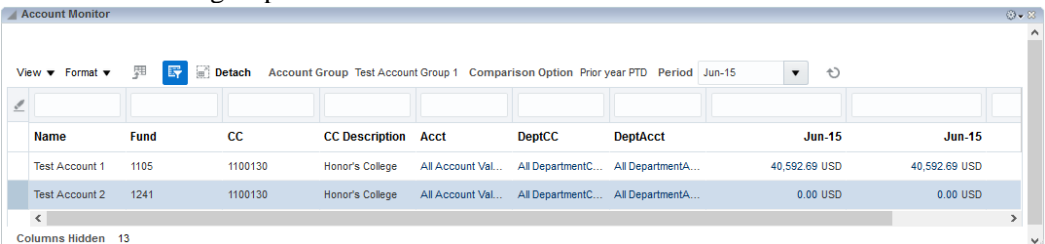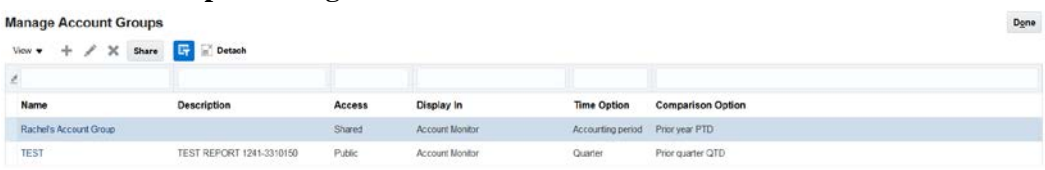| Step | Action |
|---|---|
| 1. | Any Employees, especially Pcard holders, that will not be completing their own Expense Reports, will need to **Delegate** their **Expenses**.  Don't forget to have anyone in your department that will be traveling to also Delegate their Expenses, but remember they will have to request their own Travel Advance. |
| 2. | Double Check: Do you have all your Delegated Expense cards/ users?<br><br>*Note that all vehicle cards are now assigned to the Admin who will reconcile those transactions. |

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## GUS Financial- Invoice Imaging

| Step | Action |
|---|---|
| 1. | Be sure you have the correct email address for Production: FusionFINCloud-Invoices-EBYF-1@workflow.mail.us2.cloud.oracle.com |
| 2. | PDF of Invoice, Pay Vendor Information Form, and Supporting Documentation<br>One PDF File, One Email, One Payment to One Vendor!<br>Invoice must be the FIRST page of the PDF document. |
| 3. | Make sure you have Adobe Acrobat DC on your computer to be able to create the pdf that you will email to the Invoice Imaging queue. |

## GUS Financial- Account Monitor

| Step | Action |
|---|---|
| 1. | Recreate account groups for **Account Monitor**.<br> |
| 2. | Choose users who can see any account groups that have an access level of shared. **View > Account Group > Manage > Share**<br> |

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## What if I need help?

| Step | Action |
|------|--------|
| For Help: | Look to one of these resources if you need assistance:<br>• Job Aid<br>• Yammer groups<br>• SWAT Team Member<br>• E-mail<br>    o GUSFinance@pittstate.edu<br>    o GUSProcurement@pittstate.edu<br>    o geeks@pittstate.edu |